

Name of Procedure	Monthly Client Reports
Policy Statement	This SOP will outline guidelines for producing monthly reports for all clients
Frequency of Use	Monthly: report is due by the 3 rd working day of each new month

PURPOSE

Sending our package clients monthly reports at the same time as they receive their invoices has the following benefits:

- Improves our communication
- It's an opportunity to exceed expectations
- Allows us to add value for our clients, so they benefit from our combined experience
- Gives our internal and leadership teams an overview of what's happening with this client
- Creates transparency as we show how our time has been spent

POLICY

It is our policy that this SOP is followed by all VA's working directly with clients in order to achieve the external and internal benefits listed in Purpose.

RESPONSIBILITY

The Lead VA is responsible for producing monthly reports for both casual and retainer clients they work with, and liaising with the internal team for their contribution.

PROCEDURE

1. Save a copy of our [monthly report template](#) in their client monthly report folder in Drive. Naming convention is yy mm Monthly Report [client].
2. Draft the report before sharing with members of the team involved with this client for their input.



3. Email the report to the client copying in justine@yourva.co.nz and nikki@yourva.co.nz.

ACCOUNTABILITY

To ensure this SOP process is followed by all, the Operations Process Manager will assign a team member to perform quarterly audits of all client monthly reports to review the following:

1. Reports have been filed each month in the relevant folder.
2. The reports themselves add value for the client.
3. Findings of the above review will be recorded by the assigned team member and returned to the Operations Manager for review and follow up.
4. Operations Manager will follow-up with each Lead VA to report back on the findings for their client/s monthly reports.

KEY SOP INFORMATION

Responsible for doing process	Entire team
Ensuring the process is done	Operations Manager
Frequency	<input checked="" type="checkbox"/> Monthly

VERSION CONTROL

Author: Sue Balcomb	Approved: Justine Parsons	Reviewed: Nikki Larbey
Version: 3.1	31.03.21	31.03.23